DOCUMENT RESUME

ED 284 032 CE 047 851

TITLE	Marketing 20-30. Senior High School Teacher Resource Manual.
INSTITUTION	Alberta Dept. of Education, Edmonton. Curriculum Branch.
REPORT NO	ISBN-0-920794-56-4
PUB DATE	87
NOTE	111p.; For related manuals, see CE 047 852-855.
PUB TYPE	Guides - Classroom Use - Guides (For Teachers) (052)
EDRS PRICE	MF01/PC05 Plus Postage.
DESCRIPTORS	*Advertising; Course Descriptions; *Course Organization; Curriculum; Educational Planning; *Educational Resources; Foreign Countries; High Schools; *Learning Activities; Learning Modules; Lesson Plans; *Marketing; Merchandising; *Salesmanship; Student Evaluation; Teaching Methods; Units of Study
IDENTIFIERS	*Alberta; School Stores

ABSTRACT

This manual is intended to help teachers meet the objectives of the 1985 Alberta, Canada, Marketing 20-30 curriculum. The manual is organized in six sections. The first section contains introductory information on the Marketing 20-30 curriculum, including course objectives and a flowchart of the modules in the marketing course. Planning the course is the topic of the second section, which contains information on selecting and scheduling modules, sequencing modules, planning the course, and sample lesson plans. Suggestions for teaching the eight modules of the course are included in the third section, which makes up the bulk of the document. For each subtopic in the modules, information is included on suggested resources; suggested teaching approaches; discussion, projects, exercises, and evaluation; and teaching notes. The eight modules in this course cover the following areas: world of marketing, advertising and sales promotion, distribution of goods and services, marketing research, pricing and financial activities, selling, display, and purchasing and controlling merchandise. Tips on student evaluation and a list of learning resources make up the fourth and fifth sections of the manual. The final section describes the operation of a marketing laboratory (school store). Appendices provide blank forms for use in the project. (KC)

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Senior High School

TEACHER RESOURCE MANUAL

ED284032

Marketing 20-30

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Alberta

MARKETING 20-30

Teacher's Manual

1987

Alberta
EDUCATION

ALBERTA EDUCATION CATALOGUING IN PUBLICATION DATA

Alberta. Curriculum Branch.
Marketing 20-30 : Teacher's manual, 1987.

ISBN 0-920794-56-4

1. Marketing -- Study and teaching (Secondary) -- Alberta. 2. Marketing -- Alberta -- Curricula. I. Title.

HF5415.2.A333 1987 658.802

Preface

The purpose of this manual is to help teachers meet the objectives of the 1985 Marketing 20-30 curriculum. This manual is intended to:

a. clarify the terms used and expectations outlined in the "Topics" and "Learning Tasks" sections of the modules included in the curriculum guide.

b. help with short- and long-range planning by suggesting how to select the modules and sequence the topics within those modules.

c. review practices which encourage effective and efficient use of learning resources and laboratory facilities.

d. recommend methods of evaluating student achievement.

e. suggest alternative teaching strategies.

> This publication is a service document and is not mandatory in any way. The suggestions provided are based on the practices of successful and experienced business educators in Alberta. Since no document of this type can address all of the unique situations in schools across the province, teachers should use only those suggestions which appear appropriate for their educational environment.

This manual is unbound and punched for 3-ring binders which will allow teachers to add personal references and/or notes, or move the "Teaching Suggestions" section next to the specific module from the curriculum guide. Also, this format will make it possible to update the materials as necessary.

Acknowledgements

This manual has been developed for Alberta Education by Susan DeWijk, Lord Beaverbrook Senior High School in Calgary. The suggestions included in this manual are the result of many years of successful experience in teaching business and office procedures. We appreciate their generous sharing of expertise and resource materials.

Preparation of this manual was supervised by A.A. (Scotty) Day, and Garry Popowich, Associate Directors, Curriculum Branch, Alberta Education who authorized development and publication of this manual. The project was coordinated by Sharon Prather, Education Consultant, Office of Alberta Education. In addition, the following individuals provided invaluable assistance in the production of this document.

Curriculum Review	Dr. S. Kashuba Dorothy Haines
Editing	Anita Jenkins Helen Scarth Lisa McCardle Kim Blevins
Word Processing	Esther Yong Dianne Hohnstein

Layout: Lisa McCardle

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Marketing 20-30

MARKETING 20-30

Course Objectives

Introduction

Individuals in our society are surrounded by a complicated marketplace that uses high technology and well-trained personnel to satisfy the wants and needs of consumers. Marketing at the high school level provides an opportunity for students to develop knowledge and skills relating to the people, products, and procedures which make up the world of marketing.

Objectives

1. To introduce the marketing process and to study the various marketing activities found within the Canadian economy.

2. To acquire the techniques of marketing research and to apply those skills and techniques to decision making in the marketplace.

3. To examine and evaluate the factors related to transportation and distribution of goods and services in Canada and to relate these influences to the organization of the retail outlet.

4. To examine the role of profit and to evaluate a wide variety of pricing policies, strategies and techniques used in cash control in the marketplace.

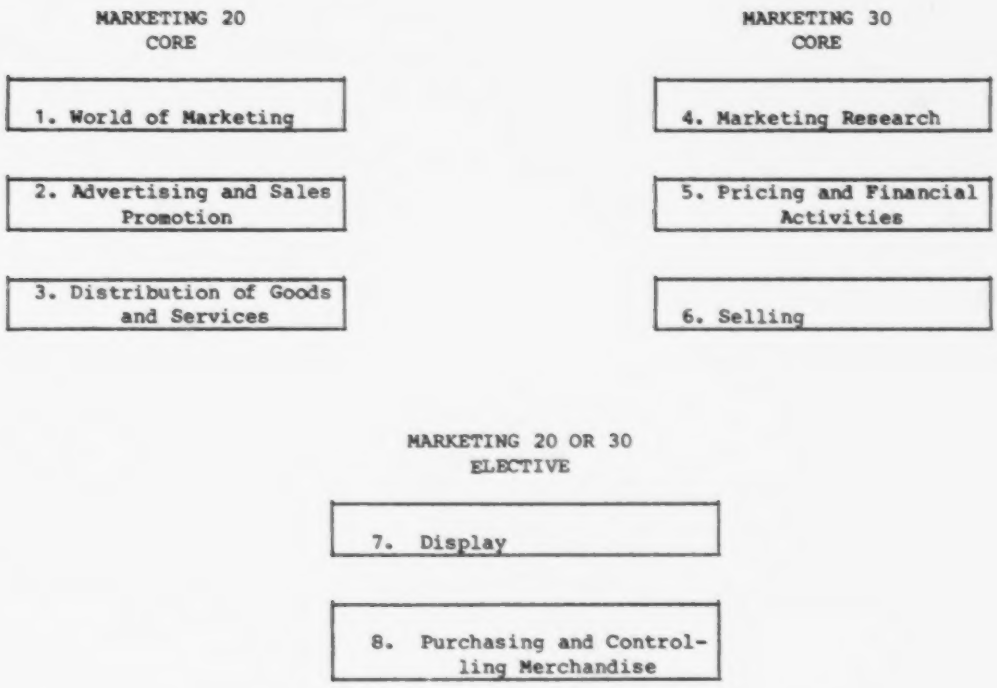
5. To investigate and analyze the procedure involved in the purchase and inventory of goods.

6. To examine the purposes and types of advertising, media alternatives, and skills involved in the creation of an effective campaign.

7. To study the role of selling in the marketing process and to analyze and apply a variety of sales techniques.

8. To learn and apply the techniques of proper visual display.

Flowchart of Modules: Marketing



Notes on Course Implementation

The marketing subject strand is composed of 8 modules. Marketing 20 may be offered for 3 or 5 credits. Marketing 30 may also be offered for 3 or 5 credits.

Three modules are designated as core at the 20 level and three are designated as core at the 30 level. The modules are not sequential. Additional modules to form a 5-credit course may be selected from the elective modules or from the Optional strand.

Modules from the Optional strand which are recommended for integration into the marketing program are:

Module 6. Business Calculation 3
9. Business Communication - Integration
10. Business Research Project
11. Goal Setting and Career Development

It is recommended that the work study component of work experience be integrated into the marketing program. Also, the work experience program could be planned in conjunction with Marketing 20 or 30.

Access to microcomputers and suitable software is recommended. A lab setting would provide an opportunity for students to apply the skills and concepts in a realistic setting. Refer to individual modules for further information regarding equipment requirements and prerequisites.

Planning

PLANNING

Selecting and Scheduling Modules

The following planning decisions will need to be made:

a. How many credits (modules) are to be offered at each grade level (3 or 5)?

b. How will the marketing courses support other business education courses offered in the school?

c. If marketing will be offered with computer support, how will the skills taught in other computer-based programs be reinforced or reviewed?

d. How will the modules selected be organized within the course?

   (Once the modules are selected, they need not be taught in sequence. Moreover, the content within the modules can be reordered and/or integrated into other modules.)

e. Which modules from the "optional" strand will be used to enhance the marketing strand? (The modules from the "optional" strand can be used to enhance the students' opportunities to build employable skills.)

Since many schools cannot offer 10 credits in marketing, Marketing 20 and 30 are often offered as 3-credit courses. These 3-credit marketing courses can be combined very effectively with other related 3-credit courses. For example:

Marketing 20 (3 credits)
Business Communication 20 (3 credits)

Marketing 20 (3 credits)
Basic Business 20 (3 credits)

Similarly, course combinations at the senior level allow students to apply skills learned in a number of courses and refine them to a job-entry level. For example:

Marketing 30 (5 credits)
Work Experience 30 (5 credits)
(scheduled in a morning or afternoon block)

Marketing 30 (3 credits)
Basic Business (3 credits)

The Planning Worksheets included in the Business Education Manual for Administrators, Counsellors, and Teachers may assist in selecting modules.

Sequencing Modules

Following are examples of ways in which the modules might be organized in Marketing 20 and Marketing 30 courses. Although the curriculum is designed in 25 hour modules, the following plan is based on 20 hours of instructional time per module. Twenty hours reflects the actual instructional time which is available considering various administrative activities that reduce instructional time.

Marketing 20	Module		
1st and 2nd Quarter	1.	World of Marketing	20 hrs.
1st and 2nd Quarter	3.	Distribution of Goods and Services	20 hrs.
	Integrate the above two modules.		
2nd and 3rd Quarter	8.	Purchasing and Controlling Merchandise	20 hrs.
2nd and 3rd Quarter	(16)*	Business Simulation (School Store Procedures)	
	Integrate the above two modules.		
4th Quarter	2.	Advertising and Sales Promotion	20 hrs.

Marketing 30			
1st Quarter	(16)*	Business Simulation (Management Emphasis)	5 hrs.
	7.	Display	10 hrs.
	5.	Pricing and Financial Activities	10 hrs.
2nd Quarter	7.	Display	5 hrs.
	6.	Selling	20 hrs.
3rd Quarter	7.	Display	5 hrs.
	5.	Pricing and Financial Activities	10 hrs.
	(16)*	Business Simulation	10 hrs.
4th Quarter	4.	Marketing Research	20 hrs.
	(16)*	Business Simulation	5 hrs.

* Instead of a business simulation, teachers may wish to use Optional Module 10: Business Research Project, to prepare a marketing manual. Refer to Text 6, Package 6, or "Starting Up a Marketing Business", Text 17, for further information. (See "Learning Resources" section of this manual for text titles.)

Planning the Course (Example)

2nd Quarter, Marketing 30, Modules 6 & 7

Daily Job Tasks

1 Lectures and class discussion on Role of the Salesperson and Interpersonal Skills. Homework - personality chart.	2 Review personality chart. Explain Projects 1 and 2. List special types of retail selling; ask students for examples of each.	3 Steps of a Sale: Lecture on Preparation for Selling. Explain Assignment 1; give product ideas to students.	4 Library and outside research on preparation for selling.	5 Library and outside research on preparation for selling.
6 Hand in Assignment 1. Lecture on Approaching the Customer. Role-playing activities. Work on Assignment 2, Developing the Approach.	7 Role-playing activities using Assignments 1-7. Lecture on Determining Needs and Wants. Work on Assignment 3.	8 Lecture on the Sales Presentation.	9 Work on Assignment 4, Product Analysis Sheet and Assignment 5, Developing the Sales Presentation.	10 Lecture on Ways of Overcoming Objections. Assignment 6, Objections and How to Overcome Them.
11 Work period.	12 Role-playing activities using Assignments 1-7. Lecture on the Importance of Closing and methods to use.	13 Work on Assignment 8, Prepare the Closing. Review of Sales Unit for examination.	14 Sales examination. When students are finished, practise Sales Presentation.	15 Develop written projects into oral presentations. Assign time slots for taping. Review evaluation form.
16 Assign display groups to different areas in the store. Select theme and merchandise. Hand in Project 1.	17 Videotape 4, Sales Presentation. Rest of class works on displays.	18 Same as day 17.	19 Same as day 17.	20 Same as day 17.
21 Same as day 17.	22 Same as day 17.	23 Evaluation of Sales Presentation.	24 Same as day 23.	25 Same as day 23.

SAMPLE LESSON PLAN 1

MODULE 6: SELLING

I. Topic: Role of Salesperson

II. Objectives

A. Students will be able to discuss the function of the salesperson in the marketing process, and explore the relationship of the salesperson to the concept of "ethics in selling".

B. Students will be able to define and describe the interpersonal skills necessary for a successful sales career.

III. Materials (See "Learning Resources" section for text references.)

A. Text 1, Chapter 8, Qualities and Skills
B. Text 6, Package 5, Getting to Know Yourself
C. Two personality charts for each student (Text 6, page 109)
D. Text 5, page 372, Interpersonal Skills

IV. Procedures

A. Routine
1. Daily job tasks
2. Attendance

B. New Learning
1. Class discussion - Ask students to discuss the functions of the salesperson in the marketing process. Add any points students may have missed.
2. Discuss the relationship of the salesperson to the concept of "ethics in selling".
3. Outline the interpersonal skills necessary for a salesperson to be successful. Ask students why it is important for a salesperson to develop good interpersonal skills.

C. Assignment
1. Hand out two personality charts to each student.
2. Ask students to evaluate their own personalities.
3. Have students find close friends or family members to evaluate their personalities.
4. Compare the two personality charts for similarities and differences.
5. Conclusion - Do others perceive you in the same way as you perceive yourself? What characteristics need to be developed to be a successful salesperson?

SAMPLE LESSON PLAN 2

MODULE 6: SELLING

I. Topics: Projects 1 and 2, Written and Oral Sales Presentations, and Special Types of Selling

II. Objectives

A. Students will select a product for their written and oral sales presentations.

B. Students will be able to define and describe the special types of retail selling, and list the advantages and disadvantages of each.

III. Materials (See "Learning Resources" section for text references.)

A. Text 5, Unit 15, Part 45

B. Blackboard, student notebooks

IV. Procedures

A. Routine
1. Attendance
2. Homework assignments

B. Review
1. Discuss results of personality chart evaluations.

C. New Learning
1. Explain Projects 1 and 2, Written and Oral Sales Presentations.
2. List and define the special types of retail selling: direct, telephone, mail order, and vending machines. Ask students for examples of each. Discuss the advantages and disadvantages of each.

D. Assignment
1. Students select a shopping or specialty item to use for their written and oral sales presentations.

SAMPLE LESSON PLAN 3

MODULE 6: SELLING

I. Topic: Preparation for Selling

II. Objectives

A. Students will be able to understand the importance of preparation for selling (the pre-approach) as an essential step in the selling process.

III. Materials (See "Learning Resources" section for text references.)

A. Text 1, Chapter 7, Selling

B. Text 5, Unit 15, Part 44, The Retail Sales Task

C. Blackboard, student notebooks

IV. Procedures

A. Routine
1. Daily job tasks
2. Attendance
3. Students hand in homework assignment, and name of product for sales presentation

B. New Learning
1. Define the pre-approach as: learning all there is to know about the product, competition, and customer; knowing store or company policies; and developing confidence in your abilities to sell.
2. Discuss each of the above topics in detail. Why is each part of the pre-approach important to the selling process?

C. Assignment 1 - Pre-approach
1. Students research a product and develop a customer profile. (Two class hours should be allowed for library and outside research.)

Suggestions for Teaching

SUGGESTIONS FOR TEACHING

The following section outlines suggestions for teaching each of the eight modules of the Marketing 20-30 program and includes reference to a number of resources. These resources are referred to by text number (Text 1, Text 2, etc.). The Learning Resources section of this manual provides the bibliographic information for each of these resources.

NOTE: A number of the learning resources listed in this section have not been evaluated by Alberta Education and their listing is not to be construed as explicit or implicit departmental approval for use. These titles are provided as a service only to assist teachers to identify potentially useful support materials for the topics. The responsibility to evaluate these resources prior to selection rests with the local jurisdiction. The resources designated as BASIC and RECOMMENDED are starred.

MODULE 1: World of Marketing (20 hours)

TOPIC: Scope of Marketing	5 hrs.	LEARNING EXPECTATION: Awareness

SUGGESTED RESOURCES

Text 2 - Chapter 1
3 - page 3: Marketing and Marketing Activities
3 - pages 3 and 6: P-D-C Cycle: Production, Distribution, Consumption, Buyers' and Sellers' Market

SUGGESTED TEACHING APPROACHES

Develop your own presentation using slides that show Retailing, Wholesaling, Manufacturing, Advertising, Transportation in action throughout your local community. Include slides of the school store.

Define marketing and describe marketing activities. Relate activities to the training that students will receive in the school store.

Explain that selling is the final marketing activity, and that all other activities depend on the products or services being sold.

Class Participation - Develop a list of job titles associated with marketing activities.

Present statistics on the number of people employed in the different areas of marketing (retailing, wholesaling, etc.). (Reference - Statistics Canada)

Relate the Production--Distribution--Consumption Cycle (P-D-C Cycle) to marketing activities. When goods are produced, they must be consumed. Distribution plays the key role between production and consumption. Distribution creates profit, employment, and consumer satisfaction, and it keeps the money moving throughout our economy.

Define buyers' market and sellers' market. Use current products in the marketplace as examples (Cabbage Patch Dolls vs Cabbage Patch Doll accessories).

TEACHING NOTES

This is an introductory module. Most of the topics will be covered in further detail in other modules. It is important to present the concepts in terms that students can understand and relate to.
The Scope of Marketing topic could serve as an introduction to Module 3, Distribution of Goods and Services.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

After showing slides, ask students what marketing means to them.

Students take notes.

Small Group Work - Ask students to use the list of marketing activities to make a list of expenses that the retailer, wholesaler, and manufacturer might incur to get the products to the consumer. Who ultimately pays for these expenses? Presentation by groups should follow.

Class Discussion - Ask students what would happen to employment in these fields if nothing were sold.

Discuss and Analyze - Is marketing important in terms of employment in Canada?

Students take notes.

Class discussion, or small group work followed by class discussion.

How is the P-D-C Cycle important to our Canadian economy? What can happen to the economic system when one or more links in the cycle break down or become ineffective?

Analyze and Discuss - Why do marketing activities have to be stepped up in a buyers' market and geared down in a sellers' market?

Prepare examination questions on this topic. Evaluate now or with the Module 3 topic, Transportation.

TOPIC: History of Marketing in Canada	3 hrs.	LEARNING EXPECTATION: Awareness

SUGGESTED RESOURCES

*Text 1 - Chapter 3

SUGGESTED TEACHING APPROACHES

Prepare a bulletin board flowchart to show the evolution of retailing.

Show the film "Why We Use Money", which explains why money replaced barter. (See Consumer and Corporate Affairs Annotated List.)

Discuss new developments in retailing such as the hypermart (total one-stop shopping) and supermarkets accepting credit cards.

Guest Speaker - Local retail store personnel to speak on new trends in retailing, or the history of their retail store(s).

TEACHING NOTES

Student must understand the sequence of events in order to understand retailing today.

This topic, History of Marketing in Canada, is a good introduction to the Module 3 topic, Types of Stores.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Students take notes.

Quiz on film.

Class Discussion - What changes can you foresee in retailing in the future?

Small Group Work - Assign each group a poster on a certain stage of retail history. Prepare a bulletin board display, putting posters in sequence.
Evaluate posters on neatness and completeness. Have students give oral presentations to the class, using posters as visual aids.

Assign students to read Chapter 3, define terms, and draw a flowchart of the evolution of retailing.
Assignments to be handed in.

Given a list to choose from, or choosing their own topic, students research one of Canada's well-known success stories.
Written report and/or oral presentation presented on research.

Evaluate this topic now or with the Module 3 topic, Types of Stores.

*Approved Resource

TOPIC: Economic Systems	2 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 2 - Chapter 1, pp. 2-4 SUGGESTED TEACHING APPROACHES Define communism, socialism, and capitalism. Outline the advantages and disadvantages of each system as related to marketing. Consumer and Corporate Affairs annotated list includes films on the economy.		TEACHING NOTES Economic systems should be reviewed only insofar as to emphasize their relationship to marketing in Canada. The role of profit will be discussing in detail in Module 5, Pricing and Financial Activities. DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Discussion - What economic system does Canada have? (Socialist and Democratic.) Ask students the advantages of combining these two systems together.
TOPIC: Role of Profit	2 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 1 - Chapter 5, pp. 63-64 * 2 - Chapter 12, pp. 233-234 SUGGESTED TEACHING APPROACHES Discuss the concept of profit as the major goal of marketing, along with customer satisfaction. Define gross profit and net profit.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Discussion - Can you have profit without customer satisfaction? Using information students learned in the Scope of Marketing topic, students discuss how profit is important to the P-D-C Cycle. What would happen to our economy if businesses did not reap a profit for their efforts?

*Approved Resource

TOPIC: Canadian Market Demography	2 hrs.	LEARNING EXPECTATION: Awareness

SUGGESTED RESOURCES

*Text 1 - Chapter 10
* 2 - Chapter 13
3 - Chapter 2, Part 1
5 - Unit 8, Part 22

SUGGESTED TEACHING APPROACHES

Define demography and explain its importance to marketing with respect to market segmentation and product differentiation.

Obtain a population map from the social studies department and, through class participation, analyze the distribution of population throughout Canada. Discuss regional differences.

Explain how marketers appeal to different segments of the population (age, sex, income, social class, ethnic origin) and how marketers can increase sales by appealing to more segments once they are established. (For example, Johnson & Johnson baby shampoo was advertised in later years to appeal to teens and adults of both sexes as well as to their original market -- mothers of babies.)

Explain how marketers put out different brands of the same product to appeal to different segments and therefore are able to capture more of the potential market (e.g., Proctor and Gamble and the soap market).

TEACHING NOTES

To develop student interest, use current products on the market to show the elements of demography.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Assign appropriate readings and questions (see text list).

Have students make decisions as to the location of various manufacturing plants, taking distribution of population into consideration.

Assign students to collect various advertisements and determine what segment of the population they are trying to reach.

Assign students to research a product line to find out how many brands one manufacturer has on the market. (Local retailers can provide information.) Examples: coffee, margarine, cereal, and toothpaste.

Once research is complete, have students analyze which segment of the market each brand appeals to.

*Approved Resource

TOPIC: The Marketing Mix	4 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 2 - Chapter 1, pp. 5-9 4 - Unit 2: The Marketing Mix 5 - Part 5: The Retail Mix		TEACHING NOTES Use products currently in the stores to explain the submixes and the decisions marketers must make. Look at packaging, price, place, and promotional campaigns that are being run in the media. Write to different manufacturers asking for marketing research information on products. Current information keeps students interested.
SUGGESTED TEACHING APPROACHES Define the marketing mix and relate it to baking a cake (Text 4 - page 7). Define the submixes; the 4 P's - Product, Price, Place, and Promotion. Describe the decisions marketers must make in each of the four submixes. Use marketing research received from manufacturers to explain the submixes. Briefly outline the role government plays in helping, competing and regulating. (Details of each will be covered in the other modules as specific topics arise.) Show the film Consumer (Corporate and Consumer Affairs). (This film describes aspects of the Unfair Trade Practices Act.)		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign appropriate readings and questions. Analyze the elements of a prestige ring and a costume ring Text 4, page 10. Discuss the submixes for various products in the store. Small Group Work - Case Studies, Text 2, Chapter 15.
TOPIC: Role of the Canadian Government	2 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 1 - Chapter 13 * 2 - Chapter 15 5 - Part 60: Government Involvement in Retailing SUGGESTED TEACHING APPROACHES Prepare a bulletin board display of brochures from different government agencies. Contact Consumer and Corporate Affairs for their Consumer Tips Catalog.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Prepare and give a written examination on Role of the Canadian Government, Marketing Mix, Role of Profit and Economic Systems.

*Approved Resource

MODULE 2: Advertising and Sales Promotion (20 hours)

TOPIC: Sales Promotion Activities	3 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 9 * 2 - Chapters 6, 9, 10 SUGGESTED TEACHING APPROACHES List the various forms of sales promotions. Analyze the effectiveness of a particular sales promotion activity. Discuss the role of psychology in sales promotion. Identify legal constraints on sales promotion activity.		TEACHING NOTES Have students use scrapbooks to collect and analyze advertisements throughout this module. The more opportunities students have to analyze ads, the better the chance of their success in creating one of their own.
TOPIC: Nature of Advertising	4 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapters 2, 4, 5, and 10 5 - Unit 6, Part 16: Retail Approach, Definition and Purposes 3 - Chapter 26, Part 1: Definition, Importance, Criticisms, Consumer Protection 7 - Package 1, Phase 1 and 4: Advertising Techniques and the Three Stages of an Advertising Campaign 10c - Page 31: Publicity Page 56: Glossary of Terms SUGGESTED TEACHING APPROACHES Define and contrast advertising and publicity. Explain the importance and extent of advertising by outlining how it can serve the manufacturer (seller), the consumer, and the Canadian economy. Identify the role of advertising within sales promotion.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign appropriate readings and questions. Project - Have students collect and start a scrapbook of advertising and publicity articles.

*Approved Resource

TOPIC: Nature of Advertising (cont'd)	LEARNING EXPECTATION: Application
SUGGESTED TEACHING APPROACHES Lecture on criticisms of advertising. Show the film Consumer Power, which debates the pros and cons of advertising. (See Consumer and Corporate Affairs Annotated List.) Lecture on agencies that control advertisers. (See Text 5, page 165, and Text 3, page 194.) Guest speaker from Consumer and Corporate Affairs. Suggested topic: Enforcement of the Combines Act. Guest speaker from the Canadian Advertising Standards Advisory Board. Suggested topic: The Canadian Code of Advertising Standards. Show the film Consumer, which describes aspects of the Unfair Trade and Practices Act. (Available from ACCESS, see Consumer and Corporate Affairs Annotated List.) Analyze an effective advertising campaign. List advertising target areas and related strategies. Define the three stages of an advertising campaign. (See Text 7, Package 1, Phase 2.) Additional Resources: Film: Mirror, Mirror: An Advertiser's Scrapbook (National Film Board of Canada)	**DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION** Set up teams to debate the pros and cons of advertising. Small Group Work - Have students analyze various advertising campaigns. How closely do the advertisements follow the regulations as outlined in the Combines Investigation Act and the Canadian Code of Advertising Standards? Have students rate each campaign good or poor, and give evidence to support their opinions. Using the print advertising checklist on page 28, Text 10c, have students evaluate ads to determine whether they are successful. Assign self-testing questions at end of Phase 2.
TOPIC: Advertising Media — 4 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 9, pp. 186-198 * 2 - Chapters 7 and 8 10c - Page 29: Advertising Media Chart	

*Approved Resource

TOPIC: Advertising Media (cont'd)	LEARNING EXPECTATION: Application
SUGGESTED TEACHING APPROACHES Ask students to identify the various types of media available to advertisers. Discuss each in detail, listing the advantages and disadvantages. (Text 10c is excellent.) Invite guest speaker(s) from local TV or radio stations to discuss the types of advertising and costs involved. Arrange a field trip to the advertising department of a local newspaper.	DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign appropriate reading and selected questions from ends of chapters. Have students decide which media can be used for school store advertising within the school. Have students prepare a report or poster analyzing the medium that is most effective for a given retailer or manufacturer.

TOPIC: Advertising Campaigns — 6 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapters 6, 7, 8 and 9 3 - Chapter 29, Part 4: Methods of Measuring 5 - Unit 18 7 - Package 3, Phase 1 and 2 10c - Page 29: Measuring Marketing Results SUGGESTED TEACHING APPROACHES Discuss the differences in advertising strategies of small, medium and large organizations. Discuss the buying motives of consumers. Videotape a series of TV commercials showing both rational and emotional buying motives.	TEACHING NOTES Creation of an advertising layout puts theory into practice. Students must be equipped with the necessary tools (paper, lettering, illustrations, logos, etc.). The cut-and-paste method is best. Students do not need to be artists. DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION How do advertisers focus on the consumer's basic needs and wants? Have students collect for their scrapbooks various print advertisements that show how advertisers appeal to both rational and emotional buying motives. Have students analyze the buying motives that each commercial appeals to. Assignment - Make a collage showing advertisements which appeal to a selected buying motive.

*Approved Resource

TOPIC: Advertising Campaigns (cont'd)		LEARNING EXPECTATION: Application
Explain the major stages of advertising. Relate the four elements of an advertisement layout (headlines, illustrations, copy, signature plate) to the AIDA formula (Attention, Interest, Desire, Action). Outline the factors which make each part of an advertisement successful. Explain the various methods of measuring advertising effectiveness: Consumer Jury Test, Starch Reports, Sales Area Test, Neilsen Ratings, Retail Audits Consumer Panels, Day-After Recall.		Have students analyze different advertisements in their scrapbook for attention-getting headlines, illustrations that create interest, copy that creates desire, and a signature cut that induces action. Chapter 29, Part 4, Project 1 (Text 3).
TOPIC: Packaging and Labelling	3 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapter 11 10c - Page 32 SUGGESTED TEACHING APPROACHES Introduction - Show Filmstrip, Winning the Supermarket Game. Outline the Purposes of Packaging. Discuss definitions of trademarks, slogans, and brand names. (Cover this topic under Creation of Advertisement Layout, Signature Cut.) Invite a guest speaker from the Canadian Standards Association to speak about labelling laws, standardization, and grading. or Invite a guest speaker from Consumer and Corporate Affairs to talk about federal acts such as Hazardous Products Act, Textile Labelling Act, Consumer Packaging and Labelling Act.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Have students take the supermarket survival test and discuss the results. Select questions at the end of Chapter 11 (Text 2) for homework and/or class discussion. Prepare and give a written examination on Sales Promotion Activities, Advertising Campaigns, and Packaging and Labelling.

*Approved Resource

MODULE 3: Distribution of Goods and Services (20 hours)

TOPIC: Channels of Distribution	3 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 1 SUGGESTED TEACHING APPROACHES Flannel board figures can be prepared to show elements in the channels of distribution. Moving the elements around the board can help to explain this complex concept. Define Producer, Manufacturer, Wholesaler, and Retailer. Show how different products use different channels and why (direct vs indirect buying). List the wholesalers used in the school store. Define the different types of agents, and why they are used. List the special channels of distribution.		TEACHING NOTES Since the links of each channel are brought together by modes of transportation, it is best to teach both topics before bringing in guest speakers, taking a field trip, or assigning a major research project. DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign - Text 1, Chapter 1 Small Group Work - Students discuss and analyze the best channels to use for specific products, and explain why they have selected a certain channel. Ask students for examples of each.
TOPIC: Transportation	4 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapter 16 3 - pp. 92-97, Special Channels pp. 77-78, Agent Middleman, Additional Channels SUGGESTED TEACHING APPROACHES Define and discuss the various modes of transportation used between different channels. Using flannel board, add appropriate modes of transportation between channels for a variety of different products.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Given a list of products, students analyze the best mode of transportation to use. PROJECT (2-3 hours) - Students will select a product and research the channels and modes of transportation used. Research could extend from extracting the raw materials from the earth to the packaging. Design a poster in flowchart form, or prepare a written report to present to the class.

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TOPIC: Transportation (cont'd)		LEARNING EXPECTATION: Application
Show the film The Romance of Transportation (National Film Board). Invite a school store supplier's representative to talk about the channels and modes of transportation their company uses. Take a field trip to a local manufacturer or distributor. During or after the tour, ask about the channels and modes of transportation used to obtain raw materials, and how the product ultimately gets to the consumer.		Assignment - Have students draw a diagram showing the channels and modes of transportation used by the manufacturer or wholesaler.
TOPIC: Imports and Exports	3 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapter 17 SUGGESTED TEACHING APPROACHES Explain imports and exports using Chapter 17 of Text 2 for background or prepare reports for presentation to the class. Discuss the modes of transportation used in the import and export business. For additional information on imports and exports, write to Internal and External Affairs departments, and/or contact local customs offices.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign Text 2, Chapter 17. Read and answer questions 1, 6-10, 12, 13, 14-18, 27 and 28. Follow with class discussion and review of questions. Library Research Project - Divide the class into two groups to research Canada's exports and imports. Divide each group into categories: appliances, automobiles, food, etc. Have students report to the class. Prepare and give examinations on Scope of Marketing, Channels of Distribution, Transportation, and Imports and Exports.

*Approved Resource

TOPIC: Types of Canadian Retail Stores	5 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 1 - Chapter 4, pp. 35-38 5 - Part 19: Types of Ownership Part 6: Types of Retailers pp. 464-465: Franchises 11 - Alberta Franchise Act		TEACHING NOTES A good introduction to this topic is History of Marketing, Module 1, which covers the growth of department stores, shopping centres, and supermarkets.
SUGGESTED TEACHING APPROACHES List and describe the types of ownership and discuss the pros and cons of each. Discuss large-scale vs small-scale retailing. Guest Speaker - Corporate lawyer to discuss how to choose the right type of ownership for your business. Identify the consumer appeal of common types of retail stores. Demonstrate through the use of a flowchart diagram how the department store concept developed the supermarket, which developed the discount house, which developed the hypermart. New innovative ideas keep the wheels of retailing constantly moving in new directions. Define franchise. Guest Speaker: Lawyer to explain the limitations of franchising in Alberta. Discuss methods used to decide on the size of retail stores.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assignment: Texts 1 or 5 - Read and define terms. Open notebook quiz. How has the hypermart taken retailing one step farther? (Conclusion: Hypermart has taken the discount store and the supermarket concepts and put them under one roof, which results in mass scrambled merchandising and total one-stop shopping.) Ask students to identify well-known franchises. Project: Research one of Canada's well-known franchises. Prepare an oral or written report.
TOPICS: Store Image and Design Store Layout Store Location	5 hrs.	LEARNING EXPECTATION: Awareness
SUGGESTED RESOURCES *Text 1 - Chapter 4, pp. 35-38: Store Image and Design Chapter 5, p. 62: Store Layout 5 - Part 31: Store Image Part 32: Store Layout and Design Part 64: Store Location 10c - Page 18: Location 10f - Chapters 3 and 4: Equipment and Image		TEACHING NOTES Store layout is part of the physical image of any store (design). The two topics should be taught as one.

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TOPICS: Store Image and Design (cont'd) Store Layout Store Location	LEARNING EXPECTATION: Awareness
SUGGESTED TEACHING APPROACHES Use the pie graph (10c, page 18) to identify factors to be considered in choosing a location. Guest speakers can be very helpful in teaching about location. Representatives from the following agencies may be invited: City Planning Department - Topic: Zoning Regulations and Area Growth (Land Use Studies). Transportation Planning - Topic: Traffic Patterns and Studies. Real Estate Agent - Topic: Cost of Premises and Local Business Opportunities. Outline Part 64, giving appropriate terms. Explain that store image is created through merchandising policies, sales promotion and selling policies, customer services, and store design and layout. Define the above terms and discuss each in detail. Guest Speaker - Representative of equipment distributor to talk about new trends in equipment, or planning personnel from a local retail store.	**DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION** Have students identify various local sites which would be suitable for different types of retail businesses. Have students take traffic counts in various business districts in the area. Have students survey a business district. Are there competitors nearby? Do businesses within a certain area compliment each other? Using city maps, have students locate sites of possible new businesses. Ask students to define the store images of several local retailers. Discuss what image a school store should project. What policies could be changed to create a better image? Have students analyze store buildings in their community that are currently vacant, and recommend changes to the store front that would create a more desirable site. Prepare and give subjective and objective tests on these three topics. Have students survey local businesses to determine how they keep up their images. Assignment - Have students copy (diagram) the store layout of one of the leading stores and report to class. Major Project - Have students select a business opportunity. Through research in the community they find a proper location for their business, create an image, and design their store layout to match their image. Have them build in cost factors for all phases of the project.

MODULE 4: Marketing Research (20 hours)

TOPICS: Market Research Canadian Market Environment Types of Marketing Research	2 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 10, page 225 * 2 - Chapter 13 SUGGESTED TEACHING APPROACHES Identify strategies used for market analysis. Ask students to define marketing research and explain why it is important to modern business operations.		TEACHING NOTES This module should be designed to promote the use of analytical skills and problem-solving techniques. Start each topic with open-ended questions to promote class discussion during lectures, and have students take notes. Then divide the class into small groups and use problem-solving techniques with case studies. Conclude with an individual marketing research project. Throughout the module, students will learn to work successfully on their own. DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Assign Chapter 13. Read and answer questions.
TOPIC: Canadian Market Environment	2 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES Text 1 - Chapter 10, pp. 225-239 2 - Chapter 13 SUGGESTED TEACHING APPROACHES Define demography. What are the elements of demography? Why are each of these elements important to marketing researchers? Select products that are geared to different segments of the market. Have the class analyze the demographics of each product. Use the Canadian Yearbook to interpret and forecast future trends.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Small Groups - Research Canadian firms that have conducted marketing research to identify consumer needs. (Library and outside research such as local business consultants.) Have students report the results to the class orally. Small Groups - Learning through cases, Chapter 13. Each group analyzes a case study. Have groups prepare and give oral presentations to the class.

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TOPIC: Types of Marketing Research	6 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 10, pp. 239-245 * 2 - Chapter 6: Maslow's Hierarchy of Needs Chapter 14 **SUGGESTED TEACHING APPROACHES** Define and discuss the five types of marketing research. Ask students for examples of each. Show the film Advertising the Image Marker (see Consumer and Corporate Affairs Annotated List). Relate psychological factors to the marketing process. Outline Maslow's Hierarchy of Needs, and discuss how they relate to the AIDA formula.		**DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION** Assignment: Read Chapter 14. Have students list the advantages and disadvantages of each method. Small Groups - Case Studies, Chapter 14. Follow with oral presentations. Have students take the attitudinal survey. Ask students to give examples of products which satisfy each human need in the hierarchy. How will Maslow's Hierarchy of Needs be used in marketing research? Assignment - Text 2, Chapter 6. Small Groups - Case Studies, Chapter 6. Follow with oral presentations.

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TOPIC: Conducting Market Research	10 hrs.	LEARNING EXPECTATION: Application/Mastery

SUGGESTED RESOURCES

*Text 1 - Chapter 10, pp. 239-245
* 2 - Chapter 14
7 - Package 8: Introduction to Research and Methods
Package 9: Problem-Solving Methods, and Designing a Research Project

SUGGESTED TEACHING APPROACHES

Define primary and secondary data. Discuss with students which methods use each type of data. List sources of secondary data. (Prepare a chart.)

Explain problem-solving techniques - Text 7, Package 8, Phase 1.

Outline the six steps in problem solving. It is extremely important that students take a step-by-step approach to their research project.

Have students select their research problem, and then review the sample research report in Package 9. (See page 144 for suggestions.)

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Small Groups - Case Studies, Chapter 14. Follow with oral presentations.

Individual Project - Prepare a detailed research report answering a consumer motivation research problem selected in consultation with your teacher. (This could be a school store research problem.)

Set up seven due dates (one for each chapter) plus a final date, to help students complete their report on time.

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MODULE 5: Pricing and Financial Activities (20 hours - 5 hours/LAP)

TOPICS: Financing a Business Role of Profit (LAP I) Demand Based Pricing	5 hrs.	LEARNING EXPECTATION: Application/Mastery

SUGGESTED RESOURCES

*Text 1 - Chapter 5, pp. 63-64: Role of Profit
Chapter 5, pp. 55-58: Demand-Based Pricing
* 2 - Chapter 12, pp. 216-221: Financing a Business
Chapter 12, pp. 233-234: Role of Profit
Chapter 12, pp. 221-229: Demand-Based Pricing

SUGGESTED TEACHING APPROACHES

DEFINING TERMS AND THE DEVELOPMENT OF LAP I (Learning Activity Package I)

Retailing Principles and Practices, Unit 16, Parts 46-48.

Demand-Based Pricing - Show films on supply and demand (ACCESS: Give and Take Series).

OR

Define and give examples of capital. Describe internal/external financing available to Canadian businesses. Discuss the role of the balance sheet and income statement in controlling finances.

Define profit and loss, and discuss the role of profit in the free enterprise system.

Explain, discuss and interpret the factors of supply and demand.

TEACHING NOTES

Teachers can address all of the topics in this module by developing Learning Activity Packages (LAPS), using units from various textbooks. Students take a pre-test, complete the LAP, and then take a post-test. This programmed student-centered learning approach has these advantages:

(1) The level of student understanding will vary throughout this module. For those who have backgrounds in accounting and economics, many of the topics will be a review. LAPS enables the teacher to spend more time with students who have no prior background.

(2) This approach helps to organize the program and teaches students how to use their time efficiently. After completing daily job tasks in the store, students work on their LAPS. Contracts should be set up, so that students are aware of expectations and due dates.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Pre-test - (Text 5 has good tests for each unit.)

Students read each part, define trade talk and answer questions. They complete problems and projects at the end of the unit.

Exercises on how to construct and interpret supply and demand graphs, using products available in the school store.

Post-test - Expectation - 80% accuracy or better.
If students do not pass with an 80%, they review the unit again and rewrite the test until 80% or better is achieved.

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TOPICS: Mark-up Pricing Pricing Policies (LAP II)	5 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 2 - Chapter 12, pp. 232-234: Mark-up Pricing Chapter 12, pp. 232-234: Pricing Policies		
SUGGESTED TEACHING APPROACHES DEFINING TERMS AND THE DEVELOPMENT OF LAP II Retailing Principles and Practices: LAP II. Part 65 - Developing a Pricing Strategy Part 66 - Calculating Retail Price OR Mathematics in Marketing, 2nd Edition, Chapter 7. OR Discuss the concept of mark-up. Introduce various pricing formulas, and determine mark-up levels for various products. Discuss pricing policies, and the role of mark-down as a pricing strategy.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Set-up is the same as for LAP I. Complete lessons 22-25, Talking Business, Sharpening Your Outlook, and Working with People. Complete Project 7. This is a good opportunity for student training on electronic ten-key calculators. Pre-test. Basic mathematics skill test, working with decimals and percentages. Post-test - Using products from the store, have students calculate mark-up based on both cost and retail price. Using sale items in the store, develop mark-down problems.

*Approved Resource

TOPICS: Store Operations Stock Shortages and Theft (LAP III) Cash Register Operation	5 hrs.	LEARNING EXPECTATION: Application/Mastery of Cash Register

SUGGESTED RESOURCES

*Text 1 - Chapter 6, pp. 102-110: Store Operations
Chapter 5, pp. 65-66: Stock Shortages and Theft
Chapter 5, pp. 83-91: Cash Register Operation

SUGGESTED TEACHING APPROACHES

DEFINING TERMS AND THE DEVELOPMENT OF LAP III

Text 5, Unit 5.

Part 13 - Receiving and Checking of Goods (Review)
14 - Marking of Goods
15 - Stock Shortages and Theft

Set-up is the same as in LAP I.
Include daily job tasks in the evaluation of this LAP.

OR

Discuss the procedures of receiving, marking, selling, handling returns, taking inventory, and distributing (store operations).

What are some causes of stock shortage? Describe the importance of identifying and controlling stock shortage and theft. Discuss the implications of theft and theft control for the marketplace.

Describe the technical innovations available to stores for controlling cash. Discuss inventory control through cash registers. Demonstrate proper procedures for handling cash and the operation of a cash register.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Cash Register Operation - Students can be evaluated when working in the store, and their knowledge of machine parts can be tested in writing or orally.

Have Marketing 30 students teach Marketing 20 students how to operate the cash register and about cash out procedures.

Have students identify practices that aid in controlling theft and stock shortages.

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TOPIC: Credit and Collection (LAP IV)	5 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 5 Chapter 7, pp. 140-146		
SUGGESTED TEACHING APPROACHES DEFINING TERMS AND THE DEVELOPMENT OF LAP IV Retailing Principles and Practices: Unit 10 Parts 28 - Types of Consumer Credit 29 - Credit Policies 30 - Credit Accounts Set-up is the same as in LAP I. OR Explain the factors involved in granting credit. Discuss the role of the Credit Bureau and other sources of credit information. Describe credit collection policies and methods.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Have students list and describe the major types of credit available, along with the advantages and disadvantages of each type.

*Approved Resource

MODULE 6: Selling (20 hours)

TOPIC: Role of Salesperson	1 hr.	LEARNING EXPECTATION: Mastery
SUGGESTED RESOURCES *Text 1 - Chapter 8 5 - Unit 21, Ethics in Selling SUGGESTED TEACHING APPROACHES Role of Salesperson - Class discussion on the physical, mental, social, and moral characteristics of salespeople. Explore the concept of ethics in selling. Define interpersonal skills as the ability to communicate effectively; include listening, adapting, and delivering or conveying ideas. (Text 5, page 372.)		TEACHING NOTES A teacher-centered approach is suggested for this module. Students need constant positive reinforcement to overcome their fears and lack of confidence in their abilities. Developing a written sales presentation in stages will give students a sense of structure and help them gain the confidence necessary to complete their oral sales presentation successfully. Lectures, assigned reading, class discussion, demonstrations, role-playing, and research should be used throughout this module. DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Ask students what characteristics a salesperson should have. Have them complete the personality chart (Text 6, page 109) and evaluate their personality. Class Discussion - Why is it important for a salesperson to develop good interpersonal skills?
TOPIC: Special Types of Selling	1 hr.	LEARNING EXPECTATION: Mastery
SUGGESTED RESOURCES Text 5 - Unit 15 SUGGESTED TEACHING APPROACHES List the special types of Retail Selling: Direct Selling, Telephone Selling, Mail Order, Catalogue, and Vending Machines. (Text 5, Part 45)		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Have students give examples of each type of selling. Discuss the advantages and disadvantages of each.

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TOPIC: Preparation for Selling	1 hr.	LEARNING EXPECTATION: Mastery
SUGGESTED RESOURCES *Text 1 - Chapter 7 5 - Unit 15, Pre-approach SUGGESTED TEACHING APPROACHES Define pre-approach--learning all there is to know about the product, competition and customer; knowing store or company policy; and developing confidence in your abilities to sell. Discuss the importance of emphasizing customer benefits in the selling process.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Have students identify different customer types, and analyze the various reasons for buying.
TOPIC: Making the Sale	10 hrs.	LEARNING EXPECTATION: Mastery
SUGGESTED RESOURCES *Text 1 - Chapter 7 5 - Unit 3, Approach, Making Presentation, Closing Unit 9, Determining Customer's Needs and Wants, Overcoming Objections SUGGESTED TEACHING APPROACHES Define approach as the attention stage of the sale. Define the three types of approaches (greeting, service and merchandising). Discuss: (1) why the merchandising approach is the most effective in catching the customer's attention; and (2) when a sale begins - the importance of first impression and body language. Determining Customer's Needs and Wants - Relate this step to the interest stage of the AIDA formula. Discuss the role of a salesperson as a consultant--solving customer's problems by satisfying needs.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION PROJECT 1 - Assignments 1-8 - Develop a written sales presentation in conversation form between the salesperson (yourself) and a customer. Assignment 1 - (3 hrs.) Select and research a product for your sales presentation. The product must be a shopping or specialty item. Have it approved before beginning the research. Determine the type of customer you will be selling the product to. (Allow two hours for library and outside research time.) Assignment 2 - (1 hr.) Develop and put into conversation form a merchandising approach or ice-breaking conversation for stage one of your written sales presentation. Assignment 3 - (1 hr.) Develop and put into conversation form questions and answers to determine customer needs. Add to your written sales presentation.

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TOPIC: Making the Sale (cont'd)	LEARNING EXPECTATION: Mastery
The Presentation - The presentation is the stage where interest is further developed. Discuss the importance of: (1) relating product features to customer benefits; (2) displaying and handling the product with knowledge and care; (3) appealing to as many senses as possible; and (4) using showmanship.	Assignment 4 - (1 hr.) Prepare a product analysis sheet for your product. Assignment 5 - (1 hr.) Develop and put into conversation form the presentation stage of your written sales presentation. (Spend more time on features most important to customers as determined in Assignment 3.) At least five product features should be presented. Role-Playing Activities.
Overcoming Objections - Relate this step to the desire stage of the AIDA formula. Discuss the types of objections and how to overcome them through the use of the "yes, but" method, superior point, or endorsement.	Assignment 6 - (1 hr.) Develop at least three customer objections and describe how to overcome them. Put this into conversation form and add to your presentation. Role-Playing Activities.
Closing the Sale - Relate closing the sale to the action stage of the AIDA formula. Discuss the different methods of closing and the importance of using questions that do not induce a yes/no response.	Assignment 7 - (1 hr.) Develop in conversation form and add to your written sales presentation the closing stage of the sale. Include verbal closing, writing up or ringing up the sale, wrapping, and taking leave. Written objective examination to evaluate theory. (1 hr.)
During private video sessions and one-to-one evaluation, students may do a second or third display, or a new LAP from the Pricing and Financing Module.	

TOPIC: Sales Presentation	5-7 hrs.	LEARNING EXPECTATION: Mastery
SUGGESTED TEACHING APPROACH Research a product and prepare a sales presentation.		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION Project 2, Oral Sales Presentation (10-20 minutes). Use the written sales presentation as a base for your oral sales presentation. You must have the product available, and select a class member as a customer. Presentations can be taped and presented to the entire class, or just shown to teacher. Have students evaluate their own presentations, followed by teacher evaluation. Discuss similarities and differences in evaluations, giving positive feedback and constructive criticisms.

MODULE 7: Display (20 hours)

TOPICS: Principles of Display Types of Display	6 hrs.	LEARNING EXPECTATION: Mastery

SUGGESTED RESOURCES

Text 5 - Part 17 - Varieties of Visual Merchandising
(The role of visual merchandising, windows, and interior display.)
Part 34 - Design Principles

SUGGESTED TEACHING APPROACHES

The resources listed above are excellent for either a student-centered or teacher-centered approach. A teacher-centered approach (lecture, note-taking, demonstrations) will be more effective in achieving the desired results - the creation of professional looking visual merchandising. Following are suggestions for a teacher-centered approach.

Lecture on the role of visual merchandising, promotional and institutional displays, and window and interior displays. Identify the types of displays used in retailing, and the display strategies used to create sales.

Use one or more of the following approaches in your lectures on the principles of display.

(1) Create a display as you give your lecture. Use a shadow box in front of the classroom. Ask for students' ideas.

(2) Using the slide-tape presentation Window Displays That Sell, lecture on the principles of design and colour. (This excellent teaching aid covers all principles of design and use of colours in professional displays; it is well worth the investment.)

TEACHING NOTES

Students enjoy the hands-on experience of creating window and in-store displays; and they learn more by doing than by listening to theory. Theory is important, but it should be covered as quickly and efficiently as possible. If students do not understand the principles of line and design, and the role of colour, they will be frustrated with their creations. Lack of proper supplies (back-drops, props, lighting, tools, etc.) will also result in frustration. The planning stage is therefore very important.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Give an open book or closed book quiz to evaluate students' level of understanding.

Evaluate students' ability to work efficiently in groups.

Give a written objective examination on the theory before the students begin to make their own displays.

Text 5 has unit examinations that effectively measure student understanding.

TOPICS: Display Cycles Characteristics of Effective Display Creating a Display	14 hrs.	LEARNING EXPECTATION: Mastery

SUGGESTED RESOURCES

*Text 1 - Chapter 9
5 - Part 35 - Use of Colour in Displays
Part 36 - Creating a Display

SUGGESTED TEACHING APPROACHES

Outline the phases of the display cycle.

Describe the characteristics of an effective display. Determine cost effectiveness. Lecture on how to plan, organize, and build a display.

Select three of the four types of windows for students to build throughout the year:

- Pre-season (e.g., Christmas in November)
- Runner (e.g., January Mid-Term Promotion)
- End of Season (e.g., End-of-Year Clearance in June)
- Special Event (e.g., Graduation)

Throughout the year, students can be assigned to different types of displays (window, display cases in store, overhead, point of purchase, bulletin board displays) to give them a wide range of experiences in all areas and to develop skill in creating displays.

Note: Students must create at least one display in this module. Two others are suggested to provide further practice of this skill.

TEACHING NOTES

Hand out evaluation sheets to review criteria students will be marked on. (See p. 45.)

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Divide class into groups:

- two per shadow box or small display
- three to four per large front window display

The class selects a theme and chooses merchandise from the store to use in the displays.

The students in each group follow the steps:

1. Make a sketch and have it approved.
2. Organize all supplies, props, and merchandise necessary for building the displays.
3. Build the displays and make show cards.
4. Students evaluate their own displays.
5. Teacher evaluates each display.
6. Groups discuss differences between evaluations with the teacher. (Give positive feedback as well as constructive criticisms.)

*Approved Resource

MODULE 8: Purchasing and Controlling Merchandise (20 hours)

TOPICS: Characteristics of Consumers Fashion Cycle Maintaining Contact with Suppliers	6 hrs.	LEARNING EXPECTATION: Application

SUGGESTED RESOURCES

*Text 1 - Chapter 5, pp. 58-61, Fashion Cycle
* 2 - Chapter 3, pp. 32-37, Fashion Cycle
5 - Chapter 12, Part 33, Fashion and Merchandise Image
Part 68 - Buying Goods to Produce a Profit

SUGGESTED TEACHING APPROACHES

Define merchandising (buying the right goods, at the right time, at the right price, in the right quantities). Discuss the importance of current information about trends making purchasing decisions.

Define fashion, style, and fad. Emphasize that fashion is evident in many things: clothing, home furnishings, automobiles, cosmetics, books, food, etc.

Have as a guest speaker a buyer from a major department store, or a sales representative (school store supplier). Ask the guest to discuss one or more of the following topics:

(1) fashion and fashion trends,
(2) methods used to keep up with fashion trends, and
(3) the use of electronic equipment to keep in contact with suppliers or retail customers.

Explain how you as the buyer of school store merchandise keep up with current trends and maintain contact with suppliers.

Diagram the various stages in the fashion cycle by preparing a bulletin board display. Discuss each stage and construct the display during your lecture.

TEACHING NOTES

In this module, the teacher can put theory into practice by having students complete daily job tasks in the school store.

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Class Discussion - What happens if a buyer's decision is wrong? Use current and potential new products in the store as a basis for discussion. (Results could be: money tied up in inventory, need for mark-downs, decline in profits, and limited cash flow to buy new merchandise.)

Class discussion on how television affects and creates fashion and fads. Why is it important for buyers to know current styles and fashions? Why is it important to know if a new product is a fad?

Take a field trip to a local retailer or wholesaler who uses electronic equipment for ordering.

Once the diagram is complete, discuss various products and ask students what stage each is in. Have students pin a picture of each product discussed at the appropriate stage.

Assign research on fashion history, and have students report their findings to the class.

*Approved Resource

TOPICS: Ordering Merchandise Receiving and Checking Goods	6 hrs.	LEARNING EXPECTATION: Application
SUGGESTED RESOURCES *Text 1 - Chapter 6, pp. 100-102, Ordering Merchandise Chapter 6, pp. 102-106, Receiving and Checking Goods 5 - Part 13, Receiving and Checking of Goods		
SUGGESTED TEACHING APPROACHES		DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION
Explain store procedures - ordering of goods. Use overhead projector to demonstrate how to make out a purchase order.		Practice exercises on completing a purchase order. Set up daily job tasks in the store--one for ordering non-food items, and one for ordering food. All students will complete these tasks at least once during the semester.
Explain store procedures - receiving and checking goods. This is a relatively simple procedure in a small store. Set up a field trip to a large local department store so that students can see how large shipments are handled in large-scale stores.		Assign appropriate reading and end-of-chapter activities. Follow up with class review and discussion.
If you use a business simulation module, one of your store procedures topics will be processing invoices. (Checking invoices, calculating discounts, finding due dates, recording in the purchases journal and filing invoices in the tickler file.) This topic should be included at this time to give students a good understanding of the entire purchasing systems in the store.		In the store, set up a daily job task of processing invoices. Give a store procedures test and an objective test on additional theory.

*Approved Resource

TOPICS: Inventory Procedures Merchandise Turnover	8 hrs.	LEARNING EXPECTATION: Application

SUGGESTED RESOURCES

*Text 1 - Chapter 6, pp. 98-100, Inventory Procedures
5 - Part 49 - Inventory Procedures
Part 50 - Stock Turnover
Part 67 - pp. 556-557, Open to Buy

SUGGESTED TEACHING APPROACHES

Lecture on the need of a physical inventory count and the importance of accuracy.

For part of the store stock, use a perpetual inventory system. Lecture on its time saving advantages and how a spot check can determine its accuracy.

Define open to buy and use the formula and example on pages 556-557, Text 5. Open to buy includes conversion of ending inventory from retail to cost.

Discuss stock turnover and how to calculate it. Explain the relationship of turnover to profit and selling price.

TEACHING NOTES

DISCUSSION, PROJECTS, EXERCISES, AND EVALUATION

Students will take a physical inventory count in the store, and calculate the total inventory.

Set up a daily job task of controlling the perpetual inventory system.

Class Discussion - Ask students to identify the differences between perpetual and physical inventory systems.

Have students complete the following example:
March 31, planned ending inventory, $20,000; March planned sales $10,000; March 1 inventory 22,000; orders placed 4,000. What is the Open to Buy?

Assign Text 5, Unit 50, Trade Talk, Can You Answer These Questions?

Assign Problem 1, Calculating Stock Turnover.

Test on store procedures and theory.

*Approved Resource

Student Evaluation

STUDENT EVALUATION

Suggested Evaluation
(Based on/or Marks per Module)

The following is a summary of suggested allocation of marks for each module, based on the recommended activities included in Section 4: Suggestions for Teaching.

Module 1:	World of Marketing	30 written examinations 30 projects 20 assignments 20 notebook
Module 2:	Advertising and Sales Promotion	20 advertisement layout 20 written examinations 20 scrapbook 20 assignments 20 notebook
Module 3:	Distribution of Goods and Services	30 written examinations 30 projects 20 assignments and quizzes 20 notebook
Module 4:	Marketing Research	30 written examinations 30 projects 20 assignments 20 notebook
Module 5:	Pricing and Financial Activities (LAP Evaluation)	20 written examinations 20 assignments 20 projects 20 daily job tasks 20 work in store
Module 6:	Selling	20 written examinations 20 assignments 20 oral presentation 20 display or LAP 20 work in store and daily job tasks
Module 7:	Display	20 written examinations 60 creating displays (20% for each display) 20 quizzes, assignments, and notebook
Module 8:	Purchasing and Controlling Merchandise	20 written examinations 20 notebook 20 daily job tasks 20 assignments and quizzes 20 working in store

Following are suggested guidelines for final student evaluation in Marketing 20-30.

Marketing 20, First Semester:

Assignments and Quizzes	20%
Notebooks	20%
Tests	30%
Projects	30%
	100%

Marketing 20, Second Semester:

Assignments and Quizzes	20%
Notebooks	20%
Tests	20%
Projects	20%
Working in the School Store	20%
	100%

Marketing 30, First Semester:

Assignments and Quizzes	20%
Notebooks	20%
Tests	20%
Projects	20%
Working in the School Store	20%
	100%

Marketing 30, Second Semester:

Assignments and Quizzes	20%
Notebooks	20%
Tests	30%
Projects	30%
	100%

Evaluating notebooks, assignments, and quizzes will provide for measurement of students' organizational and comprehension abilities and prepare them for better achievement on tests and projects. The test results will indicate students' knowledge of theory, and the projects will show their application of theory and their creative talents. Students' success in working in the school store will show their readiness for the working world. (Evaluation of work done in the store includes punctuality, performing assigned duties, and being a responsible and trusted worker.)

Since all of the modules could be taught independently, a 25% weighting is suggested for each term. If a final examination is preferred or required, count terms 1 and 2 as 20% each, terms 3 and 4 for 25% each, and the final examination for 10%. Note: School systems may have an evaluation policy which outlines mark allocation.

Methods of student evaluation should be chosen in accordance with the objectives of the program and the modules included in the course. Although the program is primarily theoretical, each module includes both THEORETICAL and PRACTICAL components, particularly if a marketing laboratory (school store) is part of the program. Assessment should therefore also include both components, and the marks allocated for each component should reflect the amount of time spent on it. Further, the methods used to evaluate "practical" topics should involve "practical" activities.

The "Suggestions for Teaching" section includes recommendations for evaluating the THEORETICAL and PRACTICAL components. More specific suggestions for evaluating assignments are provided on the following pages.

SALES DEMONSTRATION - RATING

THE SALESPERSON	Excellent / Very Good / Good / Fair / Poor	SCORE
Approached the customer correctly for the selling situation	5 4 3 2 1	
Used an appropriate greeting	5 4 3 2 1	
Was groomed properly	5 4 3 2 1	
Spoke clearly and distinctly	5 4 3 2 1	
Determined customer's needs	5 4 3 2 1	
Showed the merchandise effectively	10 8 6 4 2	
Was interested in the customer's problem	5 4 3 2 1	
Met objections tactfully	10 8 6 4 2	
Used sufficient merchandise information	10 8 6 4 2	
Demonstrated merchandise effectively	10 8 6 4 2	
Used suggestive selling	10 8 6 4 2	
Closed the sale effectively	10 8 6 4 2	
Used proper change-making, wrapping, and sales-slip procedures	10 8 6 4 2	
TOTAL POSSIBLE POINTS	100	POINTS.....

ADVERTISING - RATING

AD LAYOUT RATING SHEET

FACTOR	POSSIBLE POINTS	POINTS
NEATNESS	5	
ORIGINALITY OF APPROACH TO COMPLETE AD	5	
ARRANGEMENT OF COPY TO ARTWORK (LAYOUT)	10	
IDEA IN HEADLINE	20	
EXACT DESCRIPTION OF MERCHANDISE	10	
USE OF SELLING POINTS IN COPY	20	
IDENTIFICATION OF ITEM IN ARTWORK	5	
SIGNATURE CUT	15	
LOCATION OF STORE	5	
STORE HOURS OR OTHER INFORMATION (LAY-AWAY, CHARGE, ETC.)	5	
TOTAL POINTS	100	

1. POWER TO ATTRACT ATTENTION (Possible 20 points)..... .....
   Is there something moving in the window? Is the background appropriate? Is theme or idea clever? Is theme or idea well executed? Are display props suitable and attractive? Is floor appropriate to display?

2. ARRANGEMENT (Possible 20 points)..... .....
   Does window reflect the character of the store? Is there a proper amount of merchandise in the window? Do the props enhance, rather than detract from, the merchandise? Is related merchandise used? Are appropriate "dealer helps" or show cards used? Do major items within a unit point to the next? Does window make use of several vantage points?

3. CLEANLINESS (Possible 10 points)..... .....
   Is window glass clean? Is clothing (if displayed) clean and well pressed? Are the forms and fixtures clean and in good repair? Is the floor clean? Is the background clean and fresh? Are valances or frames clean? Are painted or coloured surfaces fresh and clean? Is the ceiling clean?

4. TIMELINES (Possible 10 points)..... .....
   Is the merchandise well chosen? Are colours in the window appropriate for the season and merchandise? Is the theme right for the season and merchandise? Do "dealer helps" or show cards relate to the season?

5. SELLING POWER (Possible 20 points)..... .....
   Do display props focus attention on the merchandise, but not detract from it? Are the merchandise features clearly shown? Does special lighting emphasize the most important merchandise? Do show cards bring out the important selling points of the merchandise? Does theme aid the features of the merchandise in the window? Is it possible to find and concentrate on the most important item? Is the merchandise displayed as it would be used?

6. LIGHTING (Possible 5 points)..... .....
   Does lighting enhance the colours used in the window? Is lighting equipment adequate? Are lighting fixtures clean? Does lighting focus attention on merchandise, rather than detract from it?

7. TECHNICAL EXCELLENCE (Possible 15 points)..... .....
   Is there unique use of some common items, such as chicken wire, pipe, string, etc? Does arrangement of merchandise add to its appearance? Is merchandise well folded, draped, placed, or suspended? Do drapings, foldings, and placements enhance the merchandise?

   TOTAL..... .....

A number of the learning resources listed in this section have not been evaluated by Alberta Education for tolerance and understanding. Their listing is not to be construed as explicit or implicit departmental approval for use. These titles are provided as a service only to assist teachers to identify potentially useful support materials for the topics. The responsibility to evaluate these resources prior to use with students rests with the local jurisdiction. The resources designated as BASIC and RECOMMENDED (starred) have Alberta Education evaluation criteria.

Part 4

Learning Resources

LEARNING RESOURCES

A. Approved Print

BASIC Learning Resources:

TALLER, T. Introductory Marketing: A Retail Perspective. Toronto: McGraw-Hill Ryerson Limited, 1977.

TALLER, T. Marketing: A Canadian Perspective. Toronto: McGraw-Hill Ryerson Limited, 1979.

RECOMMENDED Learning Resources:

TALLER, T. Projects and Activities for Introductory Marketing: A Retail Perspective. Toronto: McGraw-Hill Ryerson Limited, 1978.

TALLER, T. Teacher's Manual and Key to Accompany Introductory Marketing: A Retail Perspective. Toronto: McGraw-Hill Ryerson Limited, 1978.

TALLER, T. Projects and Activities for Marketing: A Canadian Perspective. Toronto: McGraw-Hill Ryerson Limited, 1980.

TALLER, T. Teacher's Manual and Key to Accompany Marketing: A Canadian Perspective. Toronto: McGraw-Hill Ryerson Limited, 1980.

B. Approved Computer Software (Marketing Applications)

1. ---.-- . Enterprise Sandwich Shops. Scarborough, Ontario: McGraw-Hill Ryerson Ltd., 1984.

Topics: Introductory Business, Retailing, Management, Accounting, Marketing, Small Business Management.

Program Correlation: This program can be used to enhance the material covered in Modules 3, 4, 5 and 8 of the marketing curriculum.

Components: 1 disk, and User's Manual (98 pages). Software available at Learning Resources Distributing Centre.

System Requirements: Apple II+/IIe, 32K; 1 disk drive; monitor; 80 column printer. Available in Apple format only.

Content Evaluation:

Enterprise Sandwich Shops is a simulation of free enterprise business conditions designed for four groups of three to five students each. Groups of students become actively involved in developing an understanding of business entrepreneurship, marketing, retailing, and management through the operation of a particular location of Enterprise Sandwich Shops. By analyzing monthly computer-generated reports, they alter their course of action in an attempt to have their branch generate the most profit. Upon completion of the simulation, students will be able to describe the impact of pricing, salaries, taxes, and other operating costs on net income; cite factors that affect productivity; read and interpret basic accounting statements; and explain the effects of such external forces as weather, competition and advertising, on demand.

This program provides a realistic simulation of small business operation, encouraging students to think strategically as they make their decisions. Since reports can be generated on the computer by the teacher outside of class time, it is ideally suited for situations where computer access is limited.

2. ------. Free Enterprise. Willowdale, Ontario: Science Research Associates, 1983.

Topic: Business Competition

Program Correlation: This program can be used to enhance the material covered in Modules 3, 4, 5, and 8 of the marketing curriculum.

Components: 1 disk, and User's Manual (16 pages), pad of 50 record sheets, and pad of 50 decision sheets. Software available at Learning Resources Distributing Centre.

System Requirements: Apple II+/IIe, 48K; 1 disk drive; monitor; blank disks; printer (recommended). IBM format also available.

Content Evaluation:

Free Enterprise is designed to develop the fundamentals of business organization, decision making, and analysis of operations via a simulation of corporate activity. It provides an effective representation of corporate planning and its effects on the business operations of a company. The element of competition between students induces careful decision making.

Up to six individuals or teams can compete to generate a favourable financial business activity for a given period. Students may select from three skill levels -- beginner, intermediate, or advanced. The stock market price influences all aspects of the business transactions performed.

While the program itself offers a realistic application of free enterprise concepts, it does not instruct. Rather, it assumes that students are already skilled in analyzing and interpreting company reports, and that they possess a firm understanding of stock market prices, market surveys, loans and interest payments, dividends, and the impact of advertising on research development. Teachers must thus be prepared to provide instruction in basic business terminology and the principles of business competition, and interact with students to ensure they are correctly interpreting the generated reports.

C. Learning Resources (An Annoted List)

To teach effectively the wide range of concepts and ideas within each topic of the Marketing 20-30 program, the teacher should have a reference library close at hand. The resources listed below can help teachers provide for the individual needs of their students, and can serve as a source of further details on topics.

Notes: The reference number in the left hand column corresponds to the text number listed in each module under Suggested Resources for Defining Terms. The textbooks marked with an asterisk are the only ones approved by Alberta Education. Schools wishing to use the other resources as student references should obtain approval to do so from the school board. All such resources should meet the criteria for tolerance and understanding.

Text Ref. Number

1 *TALLER, T. Introductory Marketing: A Retail Perspective. Toronto: McGraw-Hill Ryerson Ltd., 1977.

A good basic text to use when studying retail processes.

2 *TALLER, T. Marketing: A Canadian Perspective. Toronto: McGraw-Hill Ryerson Ltd., 1979.

Provides in-depth coverage of the total marketing process--advertising, marketing management, and marketing research.

3 PICARD, R. Marketing: A Canadian Profile. Toronto: Pitman Publishing, 1972.

A good resource book for developing lectures and preparing for class discussion on basic marketing concepts.

4 BANTING, P. Marketing in Canada. Toronto: McGraw-Hill Ryerson Ltd., 1973.

A good resource book for developing lectures and class discussion on basic marketing concepts.

5 RICHERT, H. Retailing Principles and Practices. Toronto: McGraw-Hill Ryerson Ltd., 1979.

A good text for all retail topics covered in the marketing curriculum. Class sets will be of great value to students. Workbooks and texts are available for each unit.

6 FRASER, R. Marketing 1. Agincourt, Ontario: Gage Educational Publications Ltd., 1977.

This text is structured in packages. A good text for case studies, evaluation ideas, and business research projects.

Text Ref. Number

7 FRASER, R. Marketing 2. Agincourt, Ontario: Gage Educational Publications Ltd., 1977.

See annotation for Marketing 1.

8 Alberta Consumer and Corporate Affairs. Consumer Educational Materials, An Annotated List. Edmonton, Alberta.

Annotated list of films, filmstrips and books on consumer education. A good resource for advertising module.

Address: Main Floor, Garneau Professional Centre
11044-82 Avenue
Edmonton, Alberta T6G 0T1

Telephone: 427-5215

8a Alberta Consumer and Corporate Affairs. Consumer Tips. Edmonton, Alberta.

A catalogue of free and available tip sheets.

Address: Box 1616
Edmonton, Alberta
T5J 2N9

8b ACCESS NETWORK. Annotated Resource Catalogue. Edmonton, Alberta.

* Annotated film resource catalogue. Give and Take series is good for supply and demand topics.

Address: 16930-114 Avenue
Edmonton, Alberta
T5M 3S2

Telephone: 451-7272

(Regional offices are located in Calgary, Lethbridge, Medicine Hat, and Red Deer.)

8c National Film Board of Canada. Annotated Resource Catalogue.

Catalogue lists films available in annotated form. Good advertising and sales films available.

Text Ref.
Number

8c Address: 10031 - 103 Avenue
Edmonton, Alberta
T5J 0G9
Telephone: 420-3012

District Office
222-1st St., S.E.
Calgary, Alberta
T2G 2G3
Telephone: 231-5338
231-5414 (Film Library)

or

P.O. Box 2957, Station M
Calgary, Alberta
T2P 3C3

9 Statistics Canada. Products and Services of the 1981 Census of Canada, and Canada Update Newsletter.

Lists statistics that can be ordered.

Telephone: 1-800-222-6400 (Toll Free)

10 Alberta Business Development and Tourism. Business Series. Eight Booklets. Edmonton, Alberta.

Good free reference booklets for a variety of topics in the marketing curriculum.

10a Starting a Business in Alberta.

10b Financing a Business in Alberta.

10c Marketing for a Small Business in Alberta.

10d Operating a Small Retail Business in Alberta.

10e Operating a Small Manufacturing Business in Alberta.

10f Operating a Small Service Business in Alberta.

10g Selecting a Data Processing System in Alberta.

10h Bookkeeping for a Small Business in Alberta

Address: Head Office
Capital Square, 10065 Jasper Avenue
Edmonton, Alberta
T5J 3B1
Telephone: 427-3685

(Regional offices located in Calgary, Camrose, Edson, Grande Prairie, Lacombe, Lethbridge, Medicine Hat, Peace River, and St. Paul.)

Text Ref. Number

11 Government of Alberta. Franchise Act. Edmonton, Alberta.

Address: Queen's Printer
11510 Kingsway Ave.
Edmonton, Alberta
T5J 2Y5

or

J.J. Bowlen Building
620-7th Avenue S.W.
Calgary, Alberta
T2P 0Y8

Telephone: 427-4952 (Edmonton)
261-6251 (Calgary)

12 Government of Canada. The Government of Canada at Your Service.

Describes the main types of government services offered to Canadians, and how to gain access to these services. Good reference for research projects.

13 LOGAN, W., and FREEMAN, M. Mathematics in Marketing. (Second Edition, Lifework Series.) Toronto: McGraw-Hill Ryerson Ltd., 1978.

Text/Workbook; good for practical mathematical exercises in sales, cash register, inventory, purchasing, pricing, and payroll. Programmed approach. (For additional Text/Workbooks in series, see McGraw-Hill Ryerson catalogue.)

14 ERNEST, J. Basic Selling. (Second Edition, The Occupational Manuals and Projects in Marketing Series.) Toronto: McGraw-Hill Ryerson Ltd., 1978.

Text/Workbook; good for role-playing activities in selling module.

15 PEGLER, M. Window Displays That Sell. New York: Retail Reporting Bureau, 1981.

Set of 80 window display slides with cassette and written narration. Includes Colour, Line, Lighting, Scale, Graphic Arts, Props, and much more. Class discussion and projects for each section included.

16 SAMON, H., and LITTLE, W.G. Display Planning Techniques. Cincinnati: Southwestern Publishing Ltd., 1979.

Covers complete display module, including exercises on colour, line and design. Display evaluation forms provided.

Text Ref. Number

17 ELY, V., and BARNES, M. Starting Your Own Marketing Business. (Second Edition, The Occupational Manuals and Projects in Marketing Series.) Toronto: McGraw-Hill Ryerson Ltd., 1978.

Covers in detail steps for starting your own business. Good resource for business research project in Marketing 30.

18 Government of Canada. Questions and Answers: Patents, Trademarks, and Industrial Design. Federal Brochures.

Answers questions related to patents, trademarks, and industrial designs.

Note: Guest speakers are a valuable resource. See individual modules for suggestions about suitable guest speakers for specific topics.

Part 5

The Marketing Laboratory

Purposes of the School Store

Schools may offer the Marketing 20-30 program with or without the marketing laboratory (school store). Teachers who choose to operate a school store should ensure that it is well organized, and that the store's main function is to provide practical experience for the students. The store should not be viewed simply as a fund-raising outlet for the school. A well-run school store can enhance the marketing program by challenging and motivating both the teacher and the students.

The school store should promote the two major goals of any retail outlet - profit and customer satisfaction. The teacher should always keep in mind, however, that the store's central purpose is training. Therefore, hours of operation and profit should be minimized. Supplies and equipment for running the program and upgrading should be obtained through the regular school budget; it should not be assumed that the store's profits will cover the costs.

Organizing the School Store

Although the school store may not be labelled as an extracurricular activity, it does take a considerable amount of preparation time and many noon hours. If possible, there should be another teacher available to help run the store during some noon hours and when the marketing teacher is absent.

In choosing the store's location, look for an area that is (in order of priority):

1. close to your marketing classroom,
2. convenient to customers (staff and students),
3. near the room where additional supplies are stored, and
4. near the receiving dock for incoming shipments.

Since the store will be a training site when it is opened and closed, easy access from the classroom is extremely important. A double room with a partition is ideal; half the room can be used for the classroom and half for the store. Where only one classroom is available, one-third of the space should be used as the store. (See layouts, p.65.)

The store does not necessarily have to be in the heaviest traffic area of the school in order to make sales.

If you buy large quantities, access to a stockroom is more important than proximity to a receiving dock. If you buy in small quantities and shipments are frequent, the reverse is true.

Equipment, Fixtures and Supplies

A counter-based operation (which is best for security purposes) requires the following equipment:

shelving	electrical outlets and sufficient wiring
counters	window display with track lighting
cash registers	microcomputer

Optional - refrigerator, freezer.

Most school stores operate on small budgets and must therefore consider inexpensive ways of obtaining some or all of the fixtures and equipment. In addition to store fixture outlets, possible sources include retailers who are renovating or going out of business, and building construction classes within the school or school system.

A salesperson from a store fixture shop can help you design your store layout and estimate costs. Often such shops sell used as well as new equipment. Look under "display" in the Business-to-Business Yellow Pages, and in the classified advertisements, and contact local retailers to find who may be going out of business or renovating. Building construction classes may be able to meet your exact requirements and perhaps save your program's money.

Types of Shelving. Adjustable shelving that can be placed horizontally or at an angle permits more versatility in displaying the different products you will carry in the store. Above eye level, angular shelving enables the customers to see the products better and could help to increase sales. Shelving with a sturdy top cover is good for in-store displays.

Types of Counters. Some counters should be designed for reserve, under-the-counter stock, and others for display.

Window Displays. If window displays do not already exist in your current store layout, consider the following alternatives:

1. display cases in other areas of the school, or
2. shadow boxes constructed out of plywood (3 1/2' x 2 1/2' x 1 1/2' in depth).

Locks on display cases are essential.

Cash Registers. Two cash registers are adequate for running the store and training on a rotating basis. Ten-key electronic machines are best, and scanners should be looked into as well. New machines are preferable as service required on reconditioned machines can be just as costly.

Microcomputers. Since all retail store operations will soon be on a computer system, training students to use microcomputers will be of great vocational value.

Electrical Outlets. Once equipment is decided upon and layout determined, contact the school board electrician. Some re-wiring and additional outlets may be needed. Extension cords pose a hazard.

Basic Equipment and Furniture List for Classroom

- Trapezoid tables
- Chairs
- Teacher's desk and chair
- Filing cabinets
- Supply cabinets
- Bookcase
- Partition (accordion type)
- Bulletin boards
- Calculators
- Typewriters
- Overhead projector
- Telephone
- Ladder
- Iron
- Ironing board
- VCR and camera

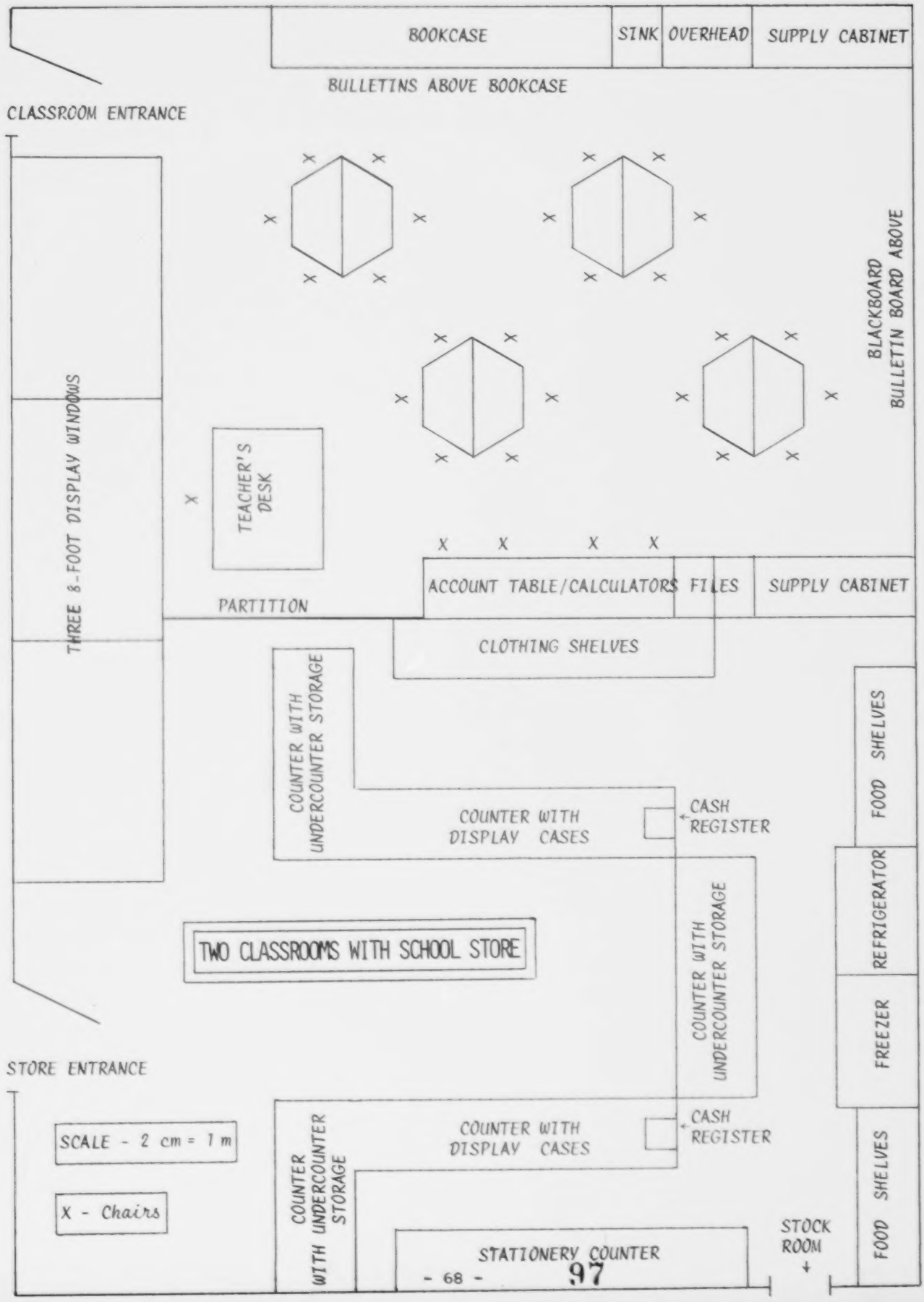
Basic Supplies for the Classroom

- Scissors
- Stapler
- Staple guns
- Tacks
- Straight pins
- Paint
- Paint brushes
- Color wheel
- Fish wire
- Ceiling hooks
- Corrugated paper
- Display stands
- Assorted colored cloth
- Lettering stencils
- Glue
- Paper towels
- Spotlights
- Filing cards
- In and out baskets
- Felt markers
- Crayons
- Window cleaner
- Sale signs
- Construction paper (all sizes and colors)

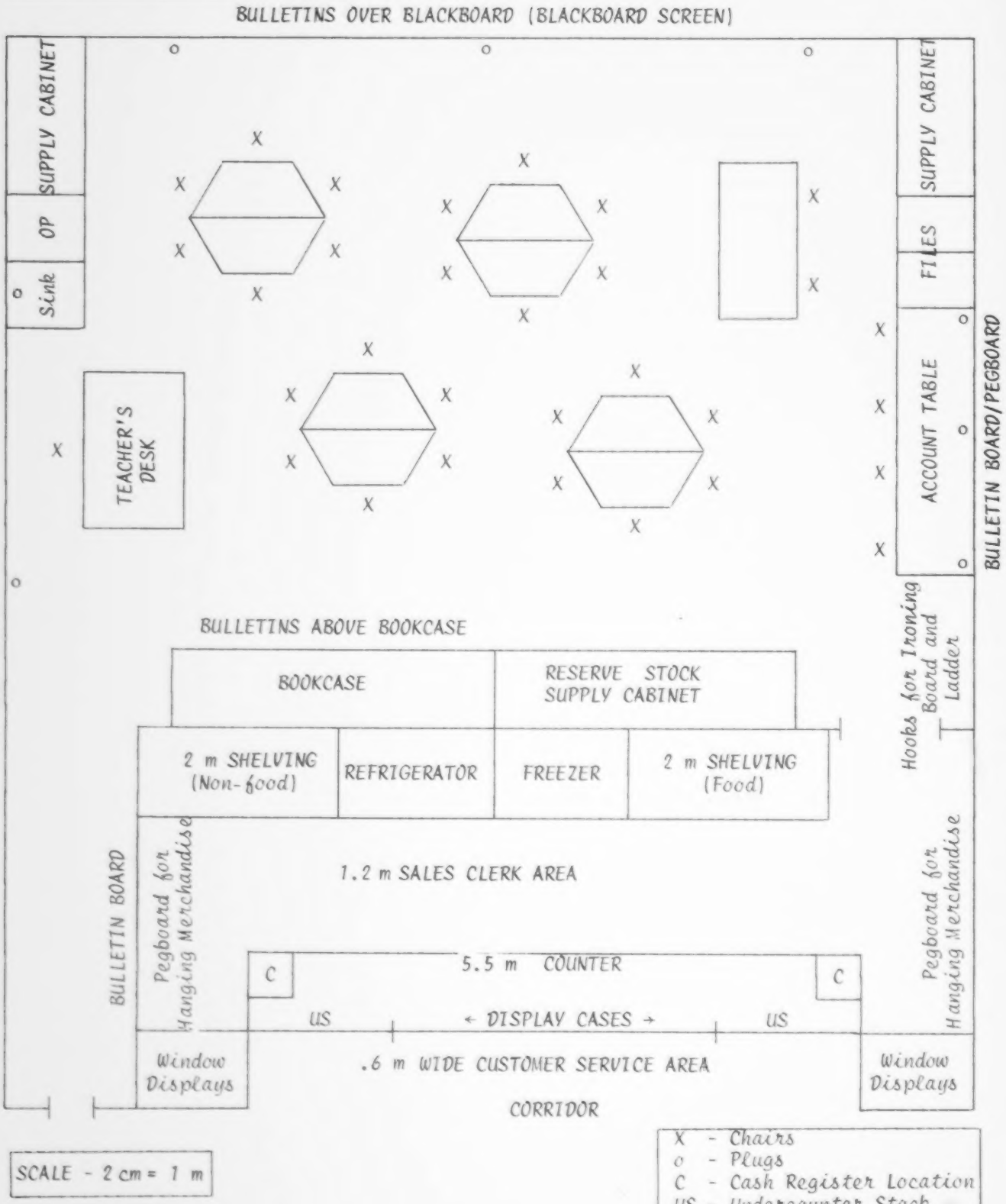
Buying Stock. Contact local food and stationery wholesalers (Business-to-Business Yellow Pages). (Check school board's policy re stocking snack items such as potato chips and drinks.) Start with basic stock and expand as the demand arises.

Basic non-food stock could include items such as pens, paper, pencils, erasers, workbooks, gym shorts, and school T-shirts. Contact different departments within the school to find out any special needs they may have.

Expanding store stock is a good project for Marketing 30 students in the Marketing Research module.


BOOKCASE
SINK
OVERHEAD
SUPPLY CABINET
BULLETINS ABOVE BOOKCASE
CLASSROOM ENTRANCE
BLACKBOARD
BULLETIN BOARD ABOVE
THREE 8-FOOT DISPLAY WINDOWS
TEACHER'S DESK
PARTITION
ACCOUNT TABLE/CALCULATORS
FILES
SUPPLY CABINET
CLOTHING SHELVES
COUNTER WITH UNDERCOUNTER STORAGE
COUNTER WITH DISPLAY CASES
CASH REGISTER
FOOD SHELVES
REFRIGERATOR
FREEZER
TWO CLASSROOMS WITH SCHOOL STORE
STORE ENTRANCE
SCALE - 2 cm = 1 m
X - Chairs
STATIONERY COUNTER
STOCK ROOM

ONE CLASSROOM WITH SCHOOL STORE



Strategies for Using the Laboratory

It is suggested that experienced Marketing 30 students work in the store during the first semester, and Marketing 20 students wait until the second semester, after they have had some initial training (Purchasing and Controlling module, Business Simulation module). However, if the marketing program is small, all students may have to work together for the entire year. In this case, the experienced students can initially handle cash and the new students can work the counter. As the year progresses, the responsibilities given to the new students can increase. When both groups work together, the Management 30 students can train the Management 20 students (Management Business Simulation).

The store should be open only when proper supervision is available. If you open during class time, you may find yourself acting as a store manager with little time for instruction. If you allow students to open during the day without supervision, you could lose cash and inventory. Some schools address this problem by hiring a lab assistant.

Weekly Work Schedules. The number of shifts per week and the number of students for each shift will vary. The following formula may be used to determine how many hours students will have to put into the store per month.

	Example
# of store hours/week	5
x 4 weeks/month	4
Total # of store hours/month	20
of students needed/shift	6
. Total # of slots/month	120
. Total # of students	20
. Total # of hours students work/month	6
. 4 weeks/month	4
# of hours a student must work/week	1.5

Many students will want to work more hours, and they should be awarded extra marks. The following sample grading scale may be useful. An average mark of 60% is given for working the required 6 hours per month. Hours above or below this number are rated as indicated in the scale.

%	hrs.	%	hrs.	%	hrs.
100 -	10	65 -	6.5	30 -	3
95 -	9.5	60 -	6	25 -	2.5
90 -	9	55 -	5.5	20 -	1
85 -	8.5	50 -	5	10 -	0.5
80 -	8	45 -	4.5	0 -	0
75 -	7.5	40 -	4		
70 -	7				

Filling in Weekly Time Schedules. Since students may have other commitments, they should decide which days they can work. Assign one student each week to sign up the rest of the class. Students are good at working out shift problems among themselves.

On the work schedule, one student should sign up to work the cash register, and then cash-out and deposit. There is more control over the cash if only one student is responsible during each shift. This approach also helps to determine individual student's problem areas (e.g., change-making skills, cash-out procedures, basic mathematical skills, confidence in ability, etc.).

A few students may sign up for cash all the time, thus preventing others from putting in enough time to gain a mastery-level skill. To solve this problem, give marks for handling cash. (For example, permit each student to work cash five times per quarter; each time they work cash they receive 10 points. ("Working cash" means running the cash register for the first half-hour, then cashing it out and making the deposit in the second half-hour.)

Keeping Records of Time. Time cards can be made using 5" x 7" index cards in slots on the bulletin board. Assign each student a time card number. Students are responsible for having their time recorded by the supervisor.

Time is computed weekly, recorded on a master sheet (located next to time cards), and new cards are made out for the next week and put in slots. If students forget to show up for work, they are docked marks (minus 1/2 hour is recorded on time card for the shift they missed). If students are sick and phone in, just as they would in a normal job, no hours will be docked. This gives them a sense of responsibility towards their work in the store.

Book Work. A set of books should be kept for the store, with all deposits and payments going through the school business office. This procedure teaches students about ordering, processing invoices, and keeping sales and cash records. The business office assigns an account number or numbers to the store, and acts as a bank. Books should be balanced monthly with the business office.

You will need the following materials to set up your bookkeeping system:

Purchasing journal
Cash journal
Sales journal

Time cards	Inventory sheets
Purchase orders	Cheques
Stock cards	Deposit book
Cash-out reports	Tickler (unpaid) file

Paid file

See the appendices for examples of some of these forms. Use simulation cheques to send to the business office, where proper school cheques are made out. Store cheques are returned to you, stamped paid, the school's cheque number recorded on them, and attached to the original invoice in the paid file.

The tickler or unpaid file is a set of folders labelled 1 - 31. Invoices are filed chronologically by due date to await payment; after invoices are paid, they are filed alphabetically.

Store Control Procedures

Purchases. All purchases are recorded in a journal when received. Food, non-food, and expenses are recorded separately, and totals for each are tallied monthly.

Sales. Cash-outs are completed daily, and deposits made daily to the business office. A sales journal is kept on a monthly basis, showing a breakdown of food and non-food sales.

Cash. Cash journals (food and non-food) are kept on a monthly basis, showing all deposits and disbursements. Cash balances are compared and balanced monthly with the business office. Total deposits for each month should balance with total sales for each month.

Inventory. Inventory is done three times per year:

1. September, October, November, December
2. January, February, March, April
3. End of June

Statements are made each time, showing profit and loss.

A physical inventory count three times per year is enough to provide learning experiences.

Daily Tasks. At this point you are probably saying to yourself, "How am I going to get all this done and still have time to teach?" The answer lies in organizing daily tasks that your students can complete within the first or last 15 - 20 minutes of class. You will act as

manager, checking jobs as they are completed. Have your Marketing 30 students complete the tasks in the first semester, and the Marketing 20 students in the second. The Marketing 20 students will be expected to be able to apply theory to daily job tasks, while Marketing 30 students will gain mastery level skill.

Set up job card slots similar to the time card slots. On each 5" x 7" card, list a job for which one student will be responsible. Put the names of all students on 3" x 5" index cards and put one in each slot. Each student now has one job to do for the week, during class. At the beginning of the next week, rotate the name cards. After students have been rotated through all job slots, they will have completed their training in all areas of the store. Students will be responsible for handing in their time cards to you to receive credit for the task completed (e.g., 2 points each time a task is completed).

You can mark the job number down on the time card, and at the end of the week compute and record on a master sheet. Record the total marks at the end of the quarter.

Following is a list of suggested daily tasks:

1. clean, rotate, and stock food counters
2. clean, rotate, and organize under-the-counter stock
3. clean, rotate, and stock stationery and clothing counters
4. organize, clean, sign in and sign out merchandise from the stockroom
5. general clean-up (floor, windows, and counters)
6. order food stock
7. order non-food stock
8. process incoming invoices
9. record sales and deposits
10. pay invoices
11. check cash floats in register for opening at lunch hour
12. make daily sales comparison (between this year's and last year's sales)
13. file paid invoices and cancelled cheques
14. prepare new time cards, compute weekly totals on old time cards, list totals on master sheets, and prepare work schedule for following week
15. create advertising posters for weekly specials
16. set up new props and merchandise in display cases
17. organize and keep clean display prop room

You may find that in your particular situation, some of these tasks can be divided into two. In other cases, two tasks can be combined into one.

Integrating Theory with Laboratory Work

The store can be integrated to some degree with all modules. Following are some suggestions; additional details are provided in individual modules.

Module	Topics for Which Store Can Be Used
1. World of Marketing	Marketing Mix
2. Advertising and Sales Promotion	Creation of an Advertisement Packaging and Labelling
3. Distribution of Goods and Services	Channels of Distribution Transportation Store Image Store Layout
4. Marketing Research	Types of Research Problem-Solving Techniques
5. Pricing and Financial Activities	Mark-up Pricing Store Operation Stock Shortage and Theft Cash Register Operation
6. Selling	Use products in store to show the steps of a sale Role-playing: use products to demonstrate selling techniques
7. Display	Prepare store displays using display principles
8. Purchasing and Controlling Merchandise	Ordering Merchandise Receiving and Checking Goods Manufacturer's and Supplier's Discounts Inventory Procedures Merchandise Turnover
16. Business Simulation	Store Policy Working in the Store Cash Floats Ringing in a Sale Making Change Parts of a Cash Register Cash-out Procedures, Deposits Store Book Work Non-selling Duties

Student Evaluation

As indicated earlier, students can be given marks for hours worked, for handling cash, and for daily job tasks. The following system could be used to determine a grade for work done in the store, which should count for about 20% of the total mark during each quarter.

	Possible Points
Hours Worked	100
Handling Cash	50
Daily Job Tasks	50
Total possible points for quarter	200

Safety Considerations

The store environment is relatively safe, but the following tips should be considered.

1. Do not use extension cords; install proper wiring and outlets.
2. Do not permit students to run in the store or sit on glass counter tops.
3. Use a strong, secure ladder when setting up overhead and ceiling displays.

Security

1. The following procedures will assist in maintaining a reasonable degree of security in the store. Use a counter-based operation to eliminate potential shoplifting. (This does not prevent theft by store workers.)
2. Assign one student to be responsible for the cash register for each shift, and allow no other student to touch the money. Students should know that if the cash is out a great deal when they are in charge, they will have to discuss the problem with the school administration.
3. Have students account for all over-rings. An over-ring slip must be filled out, signed by the supervisor, and the over-ring circled on the audit tape.
4. Set up an award system for perfect cash-outs (bonus marks for students who complete three cash-outs that are even during the quarter).

5. Have students immediately punch in every sale that is made. (No holding on to cash while serving another customer.)

6. Give marketing students a discount. Most retailers give 10 to 15%, which is preferable to a "5-finger" discount.

7. Do not permit marketing students buying items in the store to ring in their own sales. When a purchase is made, they must have a receipt.

8. Do not permit eating behind the counters.

9. Do not permit purses, coats, or jackets behind counters.

10. Have a teacher supervise the store whenever it is open.

11. Require any student who is caught pilfering to withdraw from the course.

12. Do not permit eating during class. Require marketing students wishing to make purchases to do so during the last five minutes of class.

13. Have the cash drawers locked when not in use and make daily deposits to the business office.

14. Set up a perpetual inventory system in the stockroom.

15. Lock window display cases, and place expensive merchandise in locked counter display cases.

Appendices

DAILY CASH RECEIPTS REPORT

_____ NUMBER OF CUSTOMERS _____

CASH RECEIPTS FOR THE DAY

FLOAT

				DOLLARS	CENTS
1¢ PIECES _____	25¢ PIECES _____			_____	_____
5¢ PIECES _____	50¢ PIECES _____			_____	_____
10¢ PIECES _____				_____	_____

PAPER MONEY

____ x 1	____ x 2	____ x 5	____ x 10	_____
____ x 20	____ x 50	____ x		_____

_____ TOTAL FLOAT _____

CASH IN DRAWER

				DOLLARS	CENTS
1¢ PIECES _____	25¢ PIECES _____			_____	_____
5¢ PIECES _____	50¢ PIECES _____			_____	_____
10¢ PIECES _____				_____	_____

PAPER MONEY

____ x 1	____ x 2	____ x 5	____ x 10	_____
____ x 20	____ x 50	____ x		_____

_____ TOTAL CASH IN DRAWER _____

TOTAL CASH IN DRAWER	_____	_____
LESS FLOAT	_____	_____
TOTAL SALES	_____	_____
TOTAL SALES ON TAPE	_____	_____
UNDER OR OVER	_____	_____

NAME _____ DATE _____

INVENTORY SHEET

SHEET NUMBER _____ ENTERED BY _____

DATE _____ EXTENDED BY _____

QUANTITY	DESCRIPTION	PRICE	EXTENSION

_____

STOCK CARD

ARTICLE _____

NUMBER AND SIZE _____ PRICE _____

MAXIMUM _____ MINIMUM _____

DAYS	IN	OUT	ON HAND

TIME CARD

WEEK ENDING _____ 19 ___

NUMBER _____

NAME _____

DAYS	REGULAR				OVERTIME		DAILY TOTAL
	IN	OUT	IN	OUT	IN	OUT	
MON							
TUE							
WED							
THU							
FRI							
SAT							
SUN							

DAYS WORKED		HOURS	RATE	EARNINGS
	REGULAR			
	OVERTIME			
	TOTAL HOURS		GROSS EARNINGS	

DEPOSIT		
CASH	DATE _____ 19 ___	
x1		
x2		
x5		
x10		
x20		
x		
COINS x1¢		
x5¢		
x10¢		
x25¢		
x		
TOTAL CASH		
CHEQUES		
TOTAL		
DEPOSITED BY		

DEPOSIT		
CASH	DATE _____ 19 ___	
x1		
x2		
x5		
x10		
x20		
x		
COINS x1¢		
x5¢		
x10¢		
x25¢		
x		
TOTAL CASH		
CHEQUES		
TOTAL		
DEPOSITED BY		